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*From the Nov. 2008 Review of  
Client Write-Up Systems*

As a part of CCH's comprehensive line of professional accounting and practice management applications, ProSystem *fx* Write-Up offers a fully integrated option for accountants providing this service to their business clients. The system supports any number of clients and departments and provides powerful drilldown financial statement generation tools, after-the-fact payroll, bank reconciliation functions, full checkwriting capabilities, advanced user customization features and streamlined workflow processes. Write-Up can import or convert transactional data from most accounting packages and can output reports to common paperless file formats. Pricing for the program starts at \$1,850.

**LEARNING CURVE & EASE OF USE — 4.5 Stars**

Based on the .NET platform, ProSystem *fx* Write-Up is extremely customizable and flexible, with very impressive user-controllable interface options and menus that can be personalized using simple drag-and-drop placement of the items. During program and client company setup tasks, the program includes an import wizard that can manage the process of pulling in or converting data from other programs, provides templates for charts of accounts, and also offers the ability to copy existing chart setups to other clients.

After selecting a company from the searchable/sortable client selection screen, ProSystem *fx* Write-Up opens to an interface that displays a customizable Shortcuts menu that is movable or minimizable as desired. The Shortcuts menu can house links to functions like transactions, reconciliation, accounts, live and after-the-fact payroll, checkwriting, or recording deposits. The screen

also offers a few icons for key features and traditional pull-down menus, while

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functions that simplify finding specific transactional data quickly. The system's reconciliation functions offer an outstanding overview screen that gives quick access to deposits, receipts, outstanding checks, prior reconciliations and other items.

The working trial balance capabilities in ProSystem *fx* Write-Up highlight and track adjusting entries and automatically process the updates on-screen. After-the-fact payroll is built into the program, while integration with PayCycle's web-based professional system is also available for live payroll processing. Write-Up also includes signature-ready payroll and wage reporting forms, including payroll and tax liability reports. Because of the very comprehensive nature of the system, it will require some training and direct experience by users before gaining full competency with all of its capabilities.

### **REPORTING & FINANCIAL STATEMENTS – 5 Stars**

As with the system's flexible interface, ProSystem *fx* Write-Up provides amazing customization options for reporting and financial statement preparation. Full sets of financials can be generated, along with comparative financials, consolidated reports and other options. Reporting processes are guided by a reporting wizard that allows users to design client-specific reports and compilation letters, or save or search previously customized reports and letters. Reports can be saved to Excel or PDF formats.

### **INTEGRATION, IMPORT/EXPORT – 5 Stars**

In addition to file saving options, ProSystem *fx* Write-Up can export data directly into other ProSystem *fx* programs, including Engagement and Trial Balance. It also offers dynamic links that enable the system to share data with ProSystem *fx* Tax, with information automatically routed to appropriate client returns. As previously noted, the system includes an import

wizard that guides users through acquisition of client transactional data (including

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program updates, news items and a good collection of FAQs. Technical support is included in pricing.

### **RELATIVE VALUE – 5 Stars**

ProSystem *fx* Write-Up represents the most technologically advanced write-up system on the market, providing outstanding flexibility and user control over virtually all aspects of the interface and displays, while also getting serious about real workflow issues by providing extensive drilldown accessibility options that are always at hand. The program can import from most accounting systems and offers export capabilities, but it really excels when used in conjunction with CCH's engagement, trial balance and tax programs.

### **2008 Overall Rating:**

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